

BREAKTHROUGH BUSINESS DEVELOPMENT

A 90-Day Plan to Take Your Business to the Next Level

This program is based on the best-selling book of the same name written by Duncan MacPherson and David Miller.

If, as the Pareto Principal States, 80 percent of your business comes from 20 percent of your clients, do you have a process to ensure that you are investing 80 percent of your time with those most deserving clients?

Achieving a business breakthrough is done by design, not by luck or chance. Breakthrough Business Development offers a clear plan to take your business to the next level. It provides a proven system that will help you manage, build, and maximize your client relationships in just 90 days, while you run your business efficiently.

The 12-week program is built on the four cornerstones of the STAR system:

1. Strategic Analysis
2. Targets and Goals
3. Activities
4. Reality Check

These four simple, proven steps provide the what, the why and the how of running and building an efficient business. The Breakthrough Business Development program includes forms and templates to help you create your own personalized business development plan for attracting and keeping valuable clients.



Duration and Time Commitment

Three Month Program with approximately 1-2 hours per week for program study and implementation.

Access to Pareto Academy

The program is supported and made actionable by the Pareto Academy, which is an online virtual coaching application that contains additional resources for implementing the strategies in each module. Resources include scripts, templates and tools.

Program Outline

Breakthrough Business Development contains the following modules:

Get Started: Introductions

1) Overview of our STAR Business Planning Process

- The S in STAR is the strategic analysis
 - The T stands for targets and goals
 - The heavy work begins with the A in STAR—activities!
 - The R is the reality check
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PART 1: Strategic Analysis (Weeks 1–4)

1) Your Untapped Opportunities

- Identify and Take Advantage

2) Marketing Pillars and the Loyalty

- Ladder
 - Identify Your MVPs
 - The Law of Attraction
 - Advocates: The Ultimate Clients
 - Moving Up the Ladder
 - Position Advocacy as a Benefit to Clients, Not to You

3) Your Overlooked Vulnerabilities

- The Importance of Organization and Structure



- Mistaking Motion for Action
- Systems Create Success

4) *The Creation and Benefits of a Procedures Manual*

- The Four Cs of Advocacy

5) *Client Classification and Triple-A—An Ideal Client Profile*

- Getting Started
- The first A of the Ideal Client Profile is simple—action
- The second A is attitude
- The third A is advocacy
- The Upside to Rightsizing
- Respectful Disassociation

6) *Build Client Chemistry with*

- FORM
 - These Fundamental Strategies Make This Approach Effective
 - GET ON IT!
 - Family
 - Occupation
 - Recreation
 - Message
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PART 2: Targets and Goals (Week 4)

7) *Success Is Achieved by Design Not by Chance*

- Goals Are the Why; Strategy Is the How
 - Something to Think About
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PART 3: Activities – Your Business Development (Weeks 5–11)

8) Establish a Client-Centered Code of Conduct Using DART

9) Deserve

- Create a Client Service Matrix
- Stir the Pot with a Ninety-Day Call Rotation

10) Ask

- Asking Starts the Receiving Process
- Ask People to Move Up Your Loyalty Ladder
- Step 1: Always Use an Agenda
- Step 2: Have No Hidden Agenda
- Scarcity Creates Abundance
- Converting Customers into Fully Empowering Clients
- Being Forthright Is Refreshing—for Everyone!
- Full Disclosure Lights the Path
- Is It Too Little, Too Late to Use Full Disclosure with Existing Customers?
- Making Exceptions: The Slippery Slope
- Attracting a Higher Quality and Quantity of Referrals
- What Is Undermining Your Refer-ability?
- The Advocate Referral Process
- Train Your Clients to Reach Out to You
 - Referral Checklist
 - P.S.—Letters to Clients Are Great as Referral Reminders
- Frame Your Way to Success

11) Reciprocate

- Create Promotional Partnerships and Strategic Alliances
- A Great and Supportive CAST
- Launching the CAST Initiative
- It Is Worth the Effort

12) Thank

- When Someone Becomes a New Client
- The Five-Step New Client Welcome Process
- Saying Thanks for a Referral: Feed the Goose
- Good Branding Is Outstanding
 - Establish a Foundation



- Milestone Recognition
- Improving Communication Is Key
- A Final Word Before We Shift from Client- Centered Marketing to Prospecting
- Shameless Plug for the Pareto Platform

13) Prospect Target Marketing

- On to Prospecting
- Avoid Spray-and-Pray Marketing
- Specialize, Don't Generalize
- An Insider's Reputation Makes you Stand Out from the Pack
- So You've Decided to Specialize...Now What?
- Converting Prospects to Clients with AICA
 - The First A in AICA Stands for Attention
 - The I in AICA Stands for Interest
 - The C in AICA Stands for Confidence
 - The Last A in AICA Stands for Action
- Give Them Something Meaningful to Ask For
- Give Prospects a Bridge to Cross
- DRIP On Them
 - The D in DRIP Stands for Discipline
 - The R in DRIP Stands for Respect
 - The I in DRIP Stands for Inform
 - The P in DRIP Stands for Persist
- Additional Points to Consider
- Four Marketing "Don'ts"
- The Moment of Truth: The Prospect Opts In!
- Additional Prospecting Concepts
 - The Telephone
 - Seminars
 - Trade Shows
 - Print Advertising
- Shifting Gears

PART 4: Reality Check (Week 12)

14) Holding Yourself Accountable

- Don't Let Your Intent Diminish
- The Qualities of Success
- B.R.E.A.K.T.H.R.O.U.G.H. to the Next Level



- Belief
- Responsibility
- Empowering
- Asking
- Knowledge
- Time Management
- Humility
- Reciprocity
- On Purpose
- Urgency
- Gratitude
- Honesty



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